

WEEK 2- UNDERSTANDING DOCUMENT

1. ServiceNow Platform Overview and Architecture

- Cloud-based platform for managing digital workflows
- Scalable PaaS for building and deploying applications
- Relational data model with tables for storing process data
- Multi-instance architecture ensures security, isolation, and performance
- Application layer with modules (e.g., ITSM, ITOM, HR)
- Workflow automation via Flow Designer and IntegrationHub
- ServiceNow Studio for custom app development
- Supports REST, SOAP, JDBC integrations with third-party systems
- Strong security features: RBAC, encryption, audit trails
- Built-in compliance and governance** tools
- Real-time analytics with reports, dashboards, and KPIs
- Scalable for business growth
- Highly customizable without impacting performance
- Mobile-ready for on-the-go access to workflows

2. User Interface and Branding:

- Intuitive UI for easy navigation and user experience
- Customizable branding options for company logos, themes, and colors
- Responsive design adaptable to different screen sizes (desktop, tablet, mobile)
- Service Portals for self-service and customer-facing interactions
- Drag-and-drop functionality for interface customization
- Role-based dashboards for personalized user views
- Widgets and components for flexible interface design
- Consistent branding across portals and applications
- UI policies and client scripts for dynamic field behavior
- Accessibility features for compliance with accessibility standards (WCAG)
- Mobile-optimized interfaces for smooth user experience on devices
- Theming tools for consistent and on-brand visual design

3. List & Filters and Forms

- Lists: Display records in a tabular format (columns and rows)
- Filters: Create and apply filters to view specific data
- Condition builder: Easy-to-use tool for creating custom filters
- Personalized lists: Users can customize columns and sorting
- Quick filtering: Apply filters directly on list headers
- List actions: Perform bulk actions like update, delete, or export
- Forms: Display and edit individual records

- Form layouts: Customizable sections and fields for better data organization
- Form validation: Ensures data integrity with mandatory fields and rules
- UI policies and Client scripts: Enable dynamic field behavior (hide, read-only, mandatory)
- Related lists: Show connected records within forms (e.g., tasks related to an incident)
- Activity stream: Displays form history and updates in real-time
- Form templates: Pre-fill forms with predefined data for quicker entry

4. Task Management

- Task-based system for tracking and managing workflows
- Assignment rules to automatically assign tasks to users or groups
- Task prioritization based on urgency, impact, or SLA
- Workflows to automate task creation, routing, and completion
- Task dependencies to manage relationships between tasks
- Notifications and reminders for task updates and deadlines
- Task tracking: Real-time status updates and progress monitoring
- Service Level Agreements (SLAs): Define response and resolution time for tasks
- Activity logs for task history and audit trails
- Escalation rules for overdue or unassigned tasks
- Task collaboration via comments and activity streams
- Checklist functionality for subtasks and detailed steps
- Mobile task management for handling tasks on the go

5. Notifications

- Automated notifications triggered by events, conditions, or workflows
- Email notifications for task updates, approvals, and alerts
- In-app notifications for real-time updates within the platform
- SMS and push notifications for mobile users
- Notification preferences for users to customize how and when they receive alerts
- Event-based notifications tied to specific actions (e.g., task assignment, SLA breach)
- Notification templates with predefined content and formatting
- Targeted notifications for specific users, groups, or roles
- Digest notifications for summarizing multiple events in one message
- Customizable triggers to define when notifications are sent
- Escalation alerts for critical or overdue tasks
- Integration with third-party tools for extended notification channels
- Notification history to track sent and received alerts

6. Knowledge Management

- Centralized repository for storing and sharing knowledge articles

- Knowledge base for self-service access to information
- Categorization of articles by topic, product, or service
- Search functionality for easy retrieval of relevant articles
- Knowledge approval workflows for article review and publishing
- Version control for managing updates and revisions to articles
- User feedback and ratings on knowledge articles
- Knowledge article templates for consistent formatting
- Access controls to restrict visibility based on roles or groups
- Multilingual support for global knowledge sharing
- Integration with incident management to suggest articles for issue resolution
- Knowledge gaps analysis to identify missing or outdated content
- Mobile access for on-the-go knowledge consumption

7. Service Catalog

- Self-service portal for requesting services and products
- Catalog items representing services, products, or actions users can request
- Categories and subcategories for organizing catalog offerings
- Request forms with customizable fields for collecting user information
- Approval workflows for automating request approvals and rejections
- Service level agreements (SLAs) for tracking response and fulfillment times
- Multi-step workflows for managing request fulfillment and delivery
- User-friendly interface for browsing and submitting requests
- Order status tracking to monitor request progress
- Catalog item templates for standardizing service offerings
- Cost estimation and pricing details for requested items
- Knowledge integration to suggest relevant articles during requests
- Mobile access for submitting and tracking requests on the go

8. Tables and Fields

- Tables: Store data in rows (records) and columns (fields)
- Base tables: Core tables provided by ServiceNow (e.g., Incident, User)
- Custom tables: User-created tables to meet specific data needs
- Fields: Define the type of data stored (e.g., text, number, date)
- Field types: Text, integer, reference, choice, date/time, etc.
- Reference fields: Link records between tables (e.g., users linked to incidents)
- Dictionary: Manage table and field definitions, properties, and configurations
- Mandatory fields: Ensure required data entry before saving records
- Default values: Pre-fill fields with preset values
- Dependent fields: Fields that change based on other field values
- Unique fields: Ensure no duplicate data in a table

- Audit history: Track changes to field values over time
- Access controls: Restrict field visibility and edit permissions based on roles

9. Access Control List

- Security mechanism for controlling access to data
- Rule-based controls for restricting access to records and fields
- Role-based permissions to grant or deny access based on user roles
- Access types: Read, write, create, delete, and execute
- Table-level controls for managing access to entire tables
- Field-level controls for restricting access to specific fields
- Conditions and scripts for defining custom access rules
- Hierarchy of ACL rules: More specific rules override general ones
- Implicit permissions granted via higher-level access (e.g., admin)
- Order of evaluation: ACLs are checked from most specific to least
- Testing ACLs: Use debugging tools to test access control behavior
- Dynamic access control based on record states or user attributes
- Audit trail to monitor who accessed or modified data

10. Data Import

- Data Import Sets: Tool for bringing data from external sources into ServiceNow.
- Transform Maps: Define how data is mapped from import sets to ServiceNow tables.
- Data Sources: Define where the data is coming from, such as CSV files, databases, or APIs.
- Scheduled Imports: Automate data imports on a recurring basis.
- Import Set Tables: Temporary tables where imported data is staged before transformation.
- Data Transformation: Process of converting and mapping imported data into the ServiceNow schema.
- IntegrationHub: Connects ServiceNow with external systems for data import and export.
- Data Validation: Ensures imported data meets required quality and format standards.
- Error Handling: Mechanisms to manage and resolve issues during data import processes.
- Data Import Jobs: Define and manage the tasks related to data importing.

11. CMDB

- Central Repository: Stores IT asset and CI information.
- CI Types: Includes hardware, software, network devices.
- Relationship Mapping: Shows CI interconnections and dependencies.
- Discovery Integration: Auto-populates data from network discovery tools.
- Change Management: Tracks CI changes and their impacts.
- Incident Management: Resolves incidents using CI context.
- Configuration Items: Detailed records of assets and their attributes.
- Data Accuracy: Ensures up-to-date and precise CI information.

- Reporting and Analytics: Provides insights into CI performance and management.

12. Integration

- IntegrationHub: Platform for connecting ServiceNow with external systems.
- APIs: Interfaces for data exchange between ServiceNow and other applications.
- Web Services: SOAP and REST APIs for integrating with external services.
- Connectors: Pre-built integrations for popular third-party applications.
- Data Import/Export: Import data into and export data from ServiceNow.
- Orchestration: Automates workflows across different systems and platforms.
- Event Management: Integrates with monitoring tools to manage and respond to events.
- Service Catalog: Integrates with other systems to provide service requests and fulfillment.
- Integration Patterns: Best practices and patterns for seamless integration.
- Security: Ensures secure data exchange through encryption and authentication mechanisms.

13. Update Sets

- Change Tracking: Records changes to configuration items and customizations.
- Version Control: Manages updates and versioning of application customizations.
- Update Set Creation: Allows you to group related changes for deployment.
- Application Customization: Tracks modifications to applications and modules.
- Preview and Commit: Previews changes before committing them to a target instance.
- Transfer: Moves update sets between different ServiceNow instances (e.g., from development to production).
- Conflict Resolution: Manages and resolves conflicts between update sets.
- Data Import: Imports update set data from one instance to another.
- Rollback: Reverts changes if issues are encountered after deployment.

14. Events

- Event Management: Monitors and manages events from IT infrastructure and applications.
- Event Data: Collects and processes event data from various sources.
- Event Rules: Defines actions to take when specific events occur.
- Alert Creation: Generates alerts based on event conditions and thresholds.
- Correlation: Groups related events to reduce noise and identify issues.
- Incident Creation: Automatically creates incidents from critical events.
- Notification: Sends notifications about events to relevant stakeholders.
- Event Dashboard: Provides a visual representation of events and their statuses.
- Integration: Connects with external monitoring tools and systems for comprehensive event management.
- Automated Response: Triggers automated workflows or remediation actions based on event rules.

15. Platform Stats

- Performance Metrics: Measures system performance, including response times and transaction volumes.
- Usage Statistics: Tracks user activity, including login frequencies and module usage.
- Capacity Management: Monitors resource utilization, such as CPU, memory, and storage.
- Service Availability: Reports on uptime and system availability.
- Incident Trends: Analyzes trends in incidents and requests over time.
- System Health: Provides insights into the overall health and stability of the platform.
- Custom Metrics: Allows tracking of custom performance and usage metrics defined by users.
- Dashboard Reports: Visual representations of key statistics for easy monitoring and analysis.
- Historical Data: Maintains historical records of performance and usage for trend analysis.
- Alerts and Notifications: Sends alerts for abnormal performance or capacity issues.